



Tagging Documents  
With Document Editor

# Tagging Documents

## Getting Started in the eClose Console

Start by clicking on the pencil icon in your eClose Console to open the Document Editor in another tab.

The screenshot displays the DocMagic eClose Console interface. At the top, the header shows "DocMagic eClose Console (Notary)" and a user profile. Below the header, there are sections for "LOAN", "LENDER", "SETTLEMENT AGENT", and a "COUNTDOWN TO CLOSING" timer. The "LOAN" section includes details like Loan #, Primary Borrower, Type, Package ID, and Worksheet #. The "LENDER" section lists Company, Contact, Email, and Phone. The "SETTLEMENT AGENT" section lists Company, Contact, Email, and Phone. The "COUNTDOWN TO CLOSING" section shows a timer for 0 days, 0 hours, 3 minutes, and 43 seconds, with a date and time of August 11, 2023, at 10:30am PDT. Below these sections are tabs for "Details", "eJournal", and "Action Log", along with a "Start eClosing" button. The "Signers (2)" section contains a table with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. The "Documents (21)" section features a table with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. A red box highlights the pencil icon in the document list, and a red arrow points from this icon to the text above.

| # | Signer Name / Email                      | Role             | Notary Name / Email                      | Notary Type / Closing Date - Time   | KBA / Status | ID Verify / Status | Status          | eSign  |
|---|--|------------------|--|-------------------------------------|--------------|--------------------|-----------------|--|
| 1 | Stephen Trullit<br>strullit@docmagic.com | Borrower         | Docmagic Notary<br>ron-test@docmagic.com | DocMagic RON<br>8/11/2023 - 10:30am |              |                    | ● Not Started   | <input type="button" value="Open Signing Room"/> |
| 2 | Andy Agent<br>strullit@docmagic.com      | Settlement Agent |  |                                     |              |                    | ● Ready to Sign | <input type="button" value="Open Signing Room"/> |

| # | eSign Enabled                         | Page(s) | Signer(s) | Completed |
|---|---------------------------------------|---------|-----------|-----------|
| 1 | Freeze/Close Letter                   | 1       | 0         | ✓         |
| 2 | Multistate Fixed Rate Electronic Note | 4       | 1         | ✓         |
| 3 | Uniform Residential Loan Application  | 8       | 1         | ✓         |



# Tagging Documents

## Left Column / Document List

If you need to find a specific document, you may scroll through the column on the left.

The screenshot displays a software interface for creating a 'Signature Affidavit and AKA Statement'. On the left side, there is a vertical column containing a list of document thumbnails. The main area on the right is a form with various fields for completion. A purple arrow points from the text box above to the document list column. Another purple arrow points from the text box below to a menu icon (three dots and three lines) located in the top-left corner of the software window.

**Signature Affidavit and AKA Statement**  
Prepare documents for signing.

State of   
County of

Subscribed and sworn to before me on , by JOHN SMITH

**This eTag cannot be edited**

Notary's Signature Date

(Notary's printed, typed or stamped name, if not in seal)

My commission expires:

(Seal, if any)

Click the icon with three dots and three lines to switch to a list of all the documents. Thumbnails of the documents will be loaded by default in the left column.



# Tagging Documents

## Locked Tags

Please note that you may no longer edit tags that have been programmed by DocMagic. Tags that cannot be changed will be displayed with a lock icon.

**Signature Affidavit and AKA Statement**  
Prepare documents for signing.

State of

County of

Subscribed and sworn to before me on  , by JOHN SMITH

**This eTag cannot be edited**

Notary's Signature

(Notary's printed, typed or stamped name, if not in seal)

My commission expires:

Notary Seal

(Seal, if any)

If you hover your mouse over a locked tag, it will say "This eTag cannot be edited". If you see a locked tag that needs to be changed, please contact the Lender.



# Tagging Documents

## Participant vs Notary Tag

Click on the [green](#) circle with the *check mark* to jump to the next Participant tag. The number next to the circle tells you how many Participant tags are in this document package – 22 in this case.

The screenshot shows a software interface for tagging documents. The title is "Signature Affidavit and AKA Statement" with the subtitle "Prepare documents for signing." The interface includes a search bar with a magnifying glass icon and a zoom level of 75%. The main content area is a form with fields for "State of" and "County of", both with dropdown menus and a "Notarization/Closi..." label. Below these is a "Subscribed and sworn to before me on" field with a "Textbox" icon and the name "JOHN SMITH". A "Notary Seal" field is present with a "Seal, if any" label. The right side of the form has fields for "Signature", "Date", "Notary Name", and "My commission expires:". A "This eTag cannot be edited" message is displayed. On the right edge of the interface, there are two circular navigation buttons: a green one with a checkmark and the number "22", and a blue one with a person icon and the number "89". A purple arrow points from the text above to the green button, and another purple arrow points from the blue button to the text below.

Click on the [blue](#) circle with the *stamp* to jump to the next Notary tag. The number next to the circle tells you how many Notary tags are in this document package – 89 in this case.

Instead of manually scrolling through the documents, we recommend checking the tags by clicking on the buttons and jumping from one tag to the next.



# Tagging Documents

## Adding Tags (Participants)

If you need to add something that must be filled out by a borrower, you can do that in PostFill. Click the little arrow to expand the list of options.

The screenshot displays a document viewer interface. On the left, a document page is shown with a table and text. The table has columns for 'Cushion Selected By Servicer \$' (558.32) and 'Total Disbursements \$'. Below the table, the document title is 'INITIAL ESCROW ACCOUNT DISCLOSURE STATEMENT' with a DocMagic logo. On the right, an 'eTags' sidebar is open, listing various tagging options: 'Signature & Initials' (with sub-options for Signature and Initials), 'PostFill' (highlighted with a green box), 'Textbox' (highlighted with a green box), 'Phone Number', 'Date', 'Checkbox', 'Radio', and 'Notary' (with a sub-option for Signature). A purple arrow points from the text box in the sidebar to a 'Text Unassigned' field on the document page, which is also highlighted with a green box. Another purple arrow points from the text box in the sidebar to the 'PostFill' option in the sidebar.

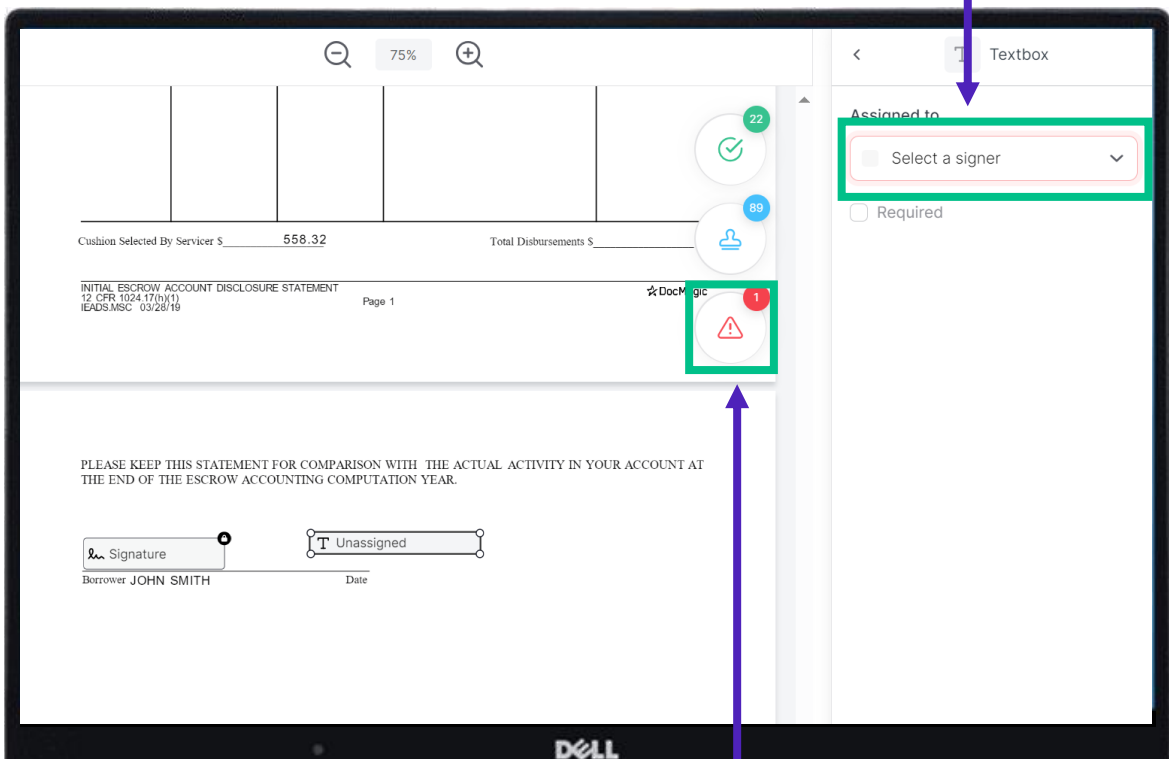
Click and drag the item you want (Textbox in this case) to your desired spot.



# Tagging Documents

## Adding Tags (Participants)

When you let go of the mouse, you'll be asked to Select a signer.



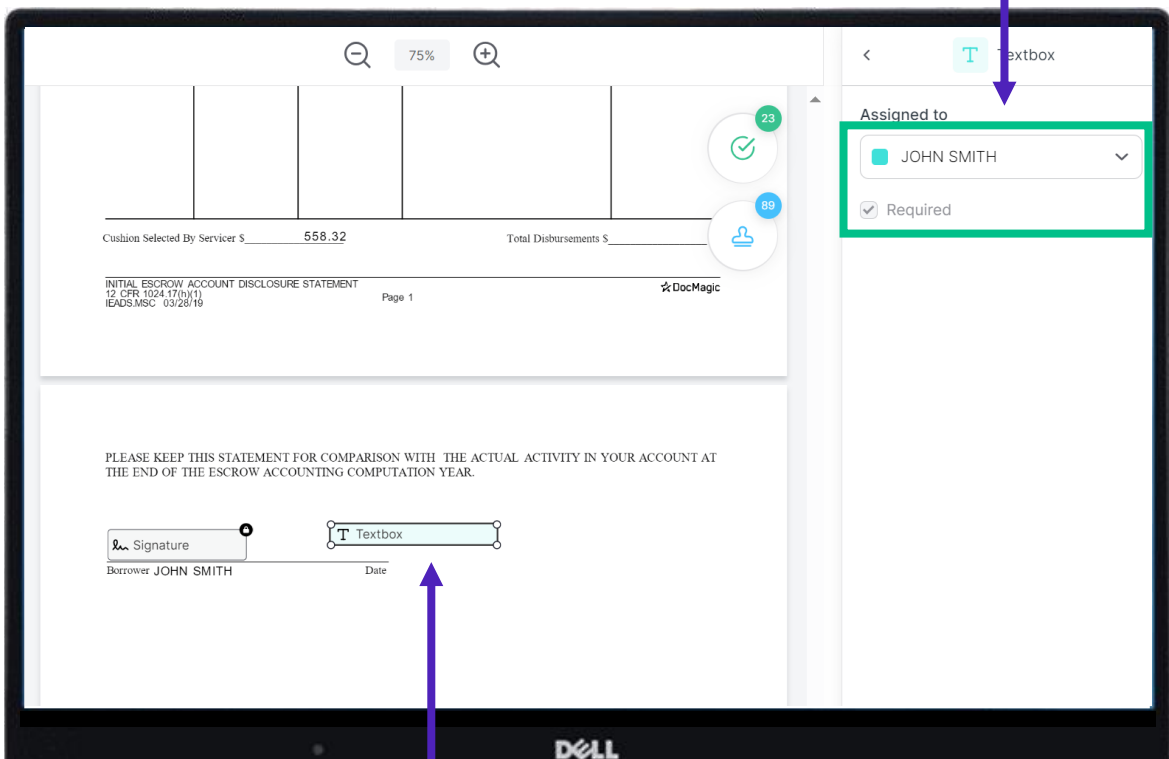
This warning triangle will appear – it is because you have an Unassigned text box.



# Tagging Documents

## Adding Tags (Participants)

Here's what that looks like after you select a Signer. Checking the Required box means that the signer can't proceed unless they fill it out.



You'll notice that the warning triangle is gone, and that the Textbox no longer says Unassigned.

Please be careful not to assign borrower tags on notary documents and vice versa. This can cause confusion and delays during the signing experience.

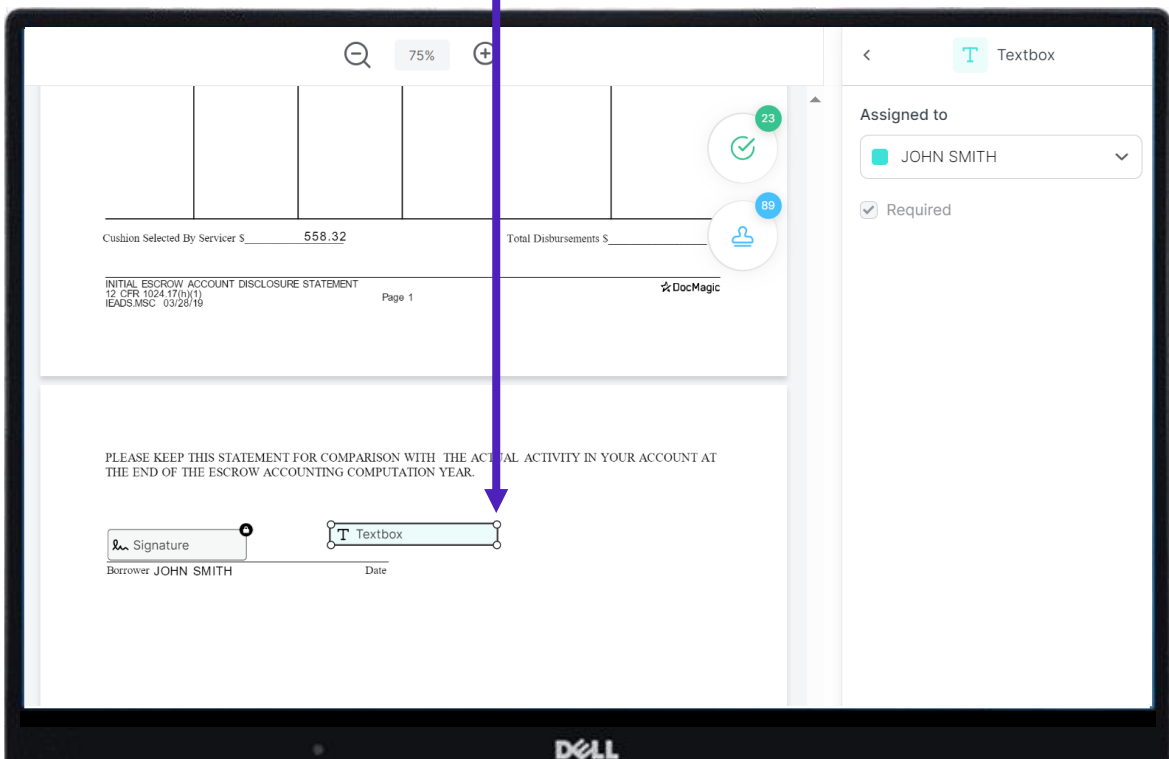




# Tagging Documents

## Selecting and Moving a Tag

Click on an editable tag at any time to select it. You'll know that the tag is selected when you see those circles on the four corners of the tag.



You can move it around to your desired location by clicking and dragging it with the mouse.



# Tagging Documents

## Deleting a Tag

To delete a tag that you added, click Delete or press backspace or delete on your keyboard.

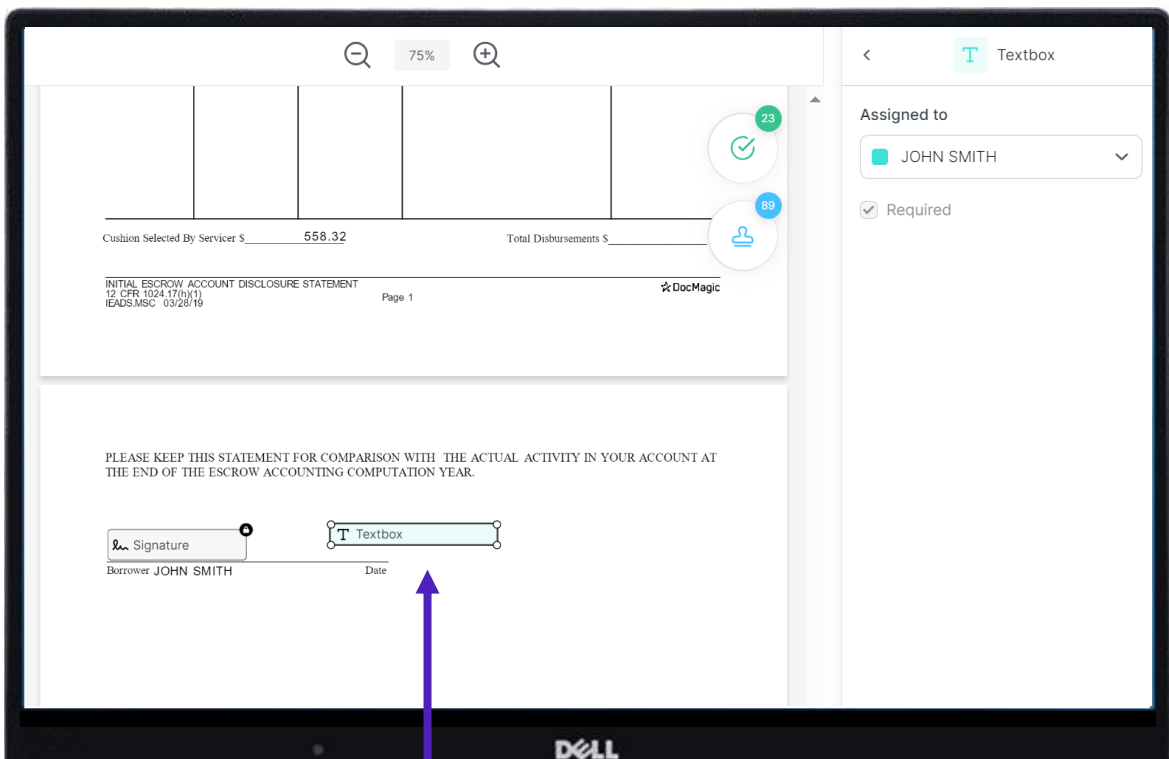
The screenshot displays a document viewer interface. The document content includes a table with columns, a form with fields for "Custion Selected By Servicer \$ 558.32" and "Total Disbursements \$", and a section titled "INITIAL ESCROW ACCOUNT DISCLOSURE STATEMENT" with a DocMagic logo. Below this is a signature line for "Borrower JOHN SMITH" and a "Date" field. A "Textbox" tag is applied to the date field. The right-hand sidebar shows the tag configuration, including "Assigned to" (JOHN SMITH) and a "Required" checkbox. A "Delete" button is highlighted with a green box at the bottom of the sidebar. A purple arrow points from the text box above to the "Delete" button.



# Tagging Documents

Fill Before You Sign!

It's important to remember that during the signing experience, you can no longer edit a document after it's been signed. You can still edit if no signatures have been applied.



If you added this textbox, make sure it's filled out before any signatures are applied.

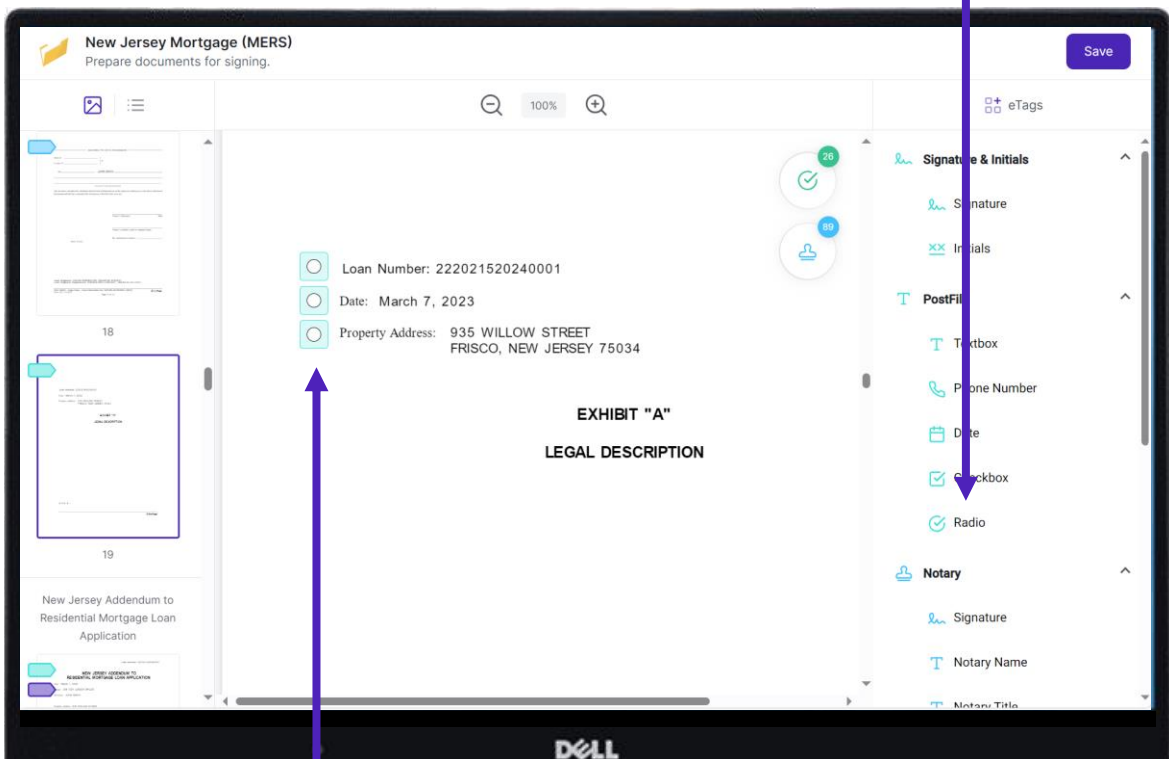
Sometimes, Settlement Agents will go in and sign ahead of time. You can usually still edit tags when that happens.



# Tagging Documents

## Radio Buttons

If you need a participant to pick one option from several – like they're answering a multiple-choice test question – choose Radio from Postfill.



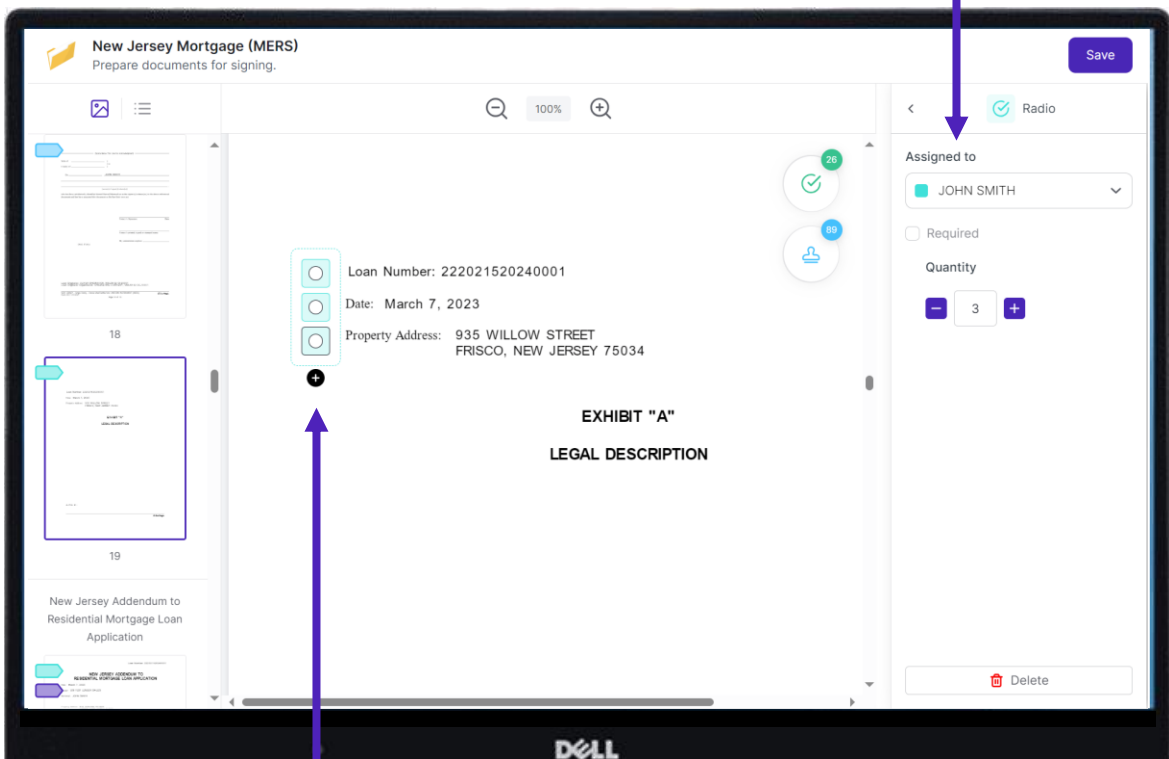
Drag and drop to your desired location, like any other tag.



# Tagging Documents

## Radio Buttons

On the right column, you can assign the radio buttons to a participant, toggle whether it's required, and change the quantity of options.



You also add additional options by clicking here.



# Tagging Documents

## Notary Tags

If you need to add something for the Notary, make sure to grab it from the Notary section.

The screenshot displays the 'New Jersey Mortgage (MERS)' software interface. The main window is titled 'Prepare documents for signing.' and features a 'Save' button in the top right corner. The interface is divided into several sections:

- Left Panel:** Shows a list of documents, including 'New Jersey Addendum to Residential Mortgage Loan Application'.
- Center Panel:** Displays a document form with fields for 'State of', 'County of', and 'On' (with the name 'JOHN SMITH'). It also includes a section for 'Notary Seal' and a 'Notary Signature' field.
- Right Panel:** A sidebar titled 'Notary' containing a list of tags for selection, such as 'Signature', 'Notary Name', 'Notary Title', 'Commission Number', 'Commission Expiration', 'Notary Seal', 'Notarization/Closing County', 'Notarization/Closing State', 'Notarization Date', 'Personally Appeared', 'Signing Date', and 'RON Regulatory Language'.

A blue arrow points from the text box above to the 'Notary' section in the right panel, indicating where to find tags for the notary section.



# Tagging Documents

## Notary Tags

If you choose a tag from the Notary section, it will be required, and you won't be able to assign it to anyone else.

The screenshot displays the 'New Jersey Mortgage (MERS)' interface. The main area shows a document form with fields for 'State of', 'County of', 'On', and 'Notary Name'. The 'Assigned to' section in the right sidebar shows a 'Notary' tag selected, which is marked as 'Required'. A purple arrow points from the text above to this 'Notary' tag.

Similarly, if you grab a non-Notary tag, you won't be able to assign it to a Notary.



# Tagging Documents

## Patriot Act

If your document package includes the Patriot Act, feel to scroll to the next page instead of hitting the blue button 57 times when checking the Notary tags.

The screenshot shows a document verification interface. At the top, it says "Customer Identification Verification" and "Prepare documents for signing." There is a "Save" button in the top right. The document being viewed is titled "USA PATRIOT ACT CUSTOMER IDENTIFICATION VERIFICATION IMPORTANT INFORMATION ABOUT PROCEDURES FOR OPENING A NEW ACCOUNT". It includes instructions for individuals completing the verification and a table for identifying documents.

Loan Number: 222021520240001

Lender: DSI TEST LENDER (SALES)

**USA PATRIOT ACT  
CUSTOMER IDENTIFICATION VERIFICATION  
IMPORTANT INFORMATION ABOUT PROCEDURES FOR OPENING A NEW ACCOUNT**

To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. What this means for you: When you open an account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.

**INSTRUCTIONS TO INDIVIDUAL COMPLETING THIS VERIFICATION**  
The named individual must present at least two (2) forms of identifying documents for review; at least one (1) of the identifying documents must be an unexpired government-issued document bearing a photograph of the named individual. Other identifying documents not specifically listed below must, at a minimum, bear the individual's name. Examples of other acceptable identifying documents include:  
Current government-issued visa; Medicare card; student identification card; voter registration card; recent property tax or utility bill; most recent W-2 or signed federal or state tax returns; bank statements; and proof of car/house/renter's insurance coverage. Please contact the above-named Lender if you have any questions regarding the acceptability of any identifying document.

Customer's Name:  IN SMITH Date of Birth: February 28, 1975  
 Residential or  Business Address: \* 123 ANYWHERE STREET  
ANYTOWN, NY 12345  
Taxpayer Identification Number (SSN): \*\* 000-00-0000

| Identifying Documents                                   | Place of Issuance | ID Number | Date of Birth | Issue/Expiration Date(s) | Photo?                   |
|---|-------------------|-----------|---------------|--------------------------|--------------------------|
| <input type="checkbox"/> State-Foreign Driver's License | T Textbox         | T Textbox | Date          | Date<br>Date             | <input type="checkbox"/> |
| <input type="checkbox"/> State-Foreign ID Card          | T Textbox         | T Textbox | Date          | Date<br>Date             | <input type="checkbox"/> |
| <input type="checkbox"/> U.S./Foreign Passport          | T Textbox         | T Textbox | Date          | Date<br>Date             | <input type="checkbox"/> |
| <input type="checkbox"/> Military ID                    | T Textbox         | T Textbox | Date          | Date<br>Date             | <input type="checkbox"/> |
| <input type="checkbox"/> Resident Alien Card            | T Textbox         | T Textbox | Date          | Date<br>Date             | <input type="checkbox"/> |
| <input type="checkbox"/> Social Security Card           | T Textbox         | T Textbox | Date          | Date<br>Date             | <input type="checkbox"/> |
| <input type="checkbox"/> Birth Certificate              | T Textbox         | T Textbox | Date          | Date<br>Date             | <input type="checkbox"/> |
| <input type="checkbox"/> Driver: T Textbox              | T Textbox         | T Textbox | Date          | Date<br>Date             | <input type="checkbox"/> |
| <input type="checkbox"/> Driver: T Textbox              | T Textbox         | T Textbox | Date          | Date<br>Date             | <input type="checkbox"/> |

On the right side, there is a list of tags: PostFill, Notary, Signature, Notary Name, Notary Title, Commission Number, Commission Expiration, Notary Seal, Notarization/Closing County, Notarization/Closing State, Notarization Date, Personally Appeared, and Signing Date.





# Tagging Documents

Save & Done

When you're satisfied with the tags, click Save, then Done. You must wait for the text to change and then click Done!

The screenshot displays the 'New Jersey Mortgage (MERS)' interface. The main area shows a document with a Notary Seal being applied. The document text includes: '[Space Below This Line For Acknowledgment]', 'State of [Notarization/Closi...]', 'County of [Notarization/Closi...]', 'On [Textbox] JOHN SMITH', '(name(s) of signer(s)/witness(es))', 'who has have satisfactorily identified himself/herself themselves as the signer(s)/ witness(es) to the above referenced document and has have executed this document as his/her/their own act.', '[RON Regulatory Language]', 'Signature [Notary's Signature] Date', 'Notary Name [Notary's printed, typed or stamped name]', and 'My commission expires: [Commission ...]'. A 'Notary Seal' is shown below the signature. On the right, the 'eTags' panel lists various tags: Signature, Notary Name, Notary Title, Commission Number, Commission Expiration, Notary Seal, Notarization/Closing County, Notarization/Closing State, Notarization Date, Personally Appeared, Signing Date, and RON Regulatory Language. A 'Save' button is in the top right, and a 'Done' button is in the bottom right of the eTags panel. A purple arrow points from the 'Done' button in the text box above to the 'Save' button in the interface.

You will be then be brought back to your Notary Portal.

